

**2008 Low-Income Taxpayer Clinic National Conference  
Pro Bono Involvement & Recruitment  
December 13, 2007**

Presented by: Virginia Martin and Joceline Champagne, NH Pro Bono Referral Program  
and Tamara Borland, Iowa Legal Aid

“Volunteers do not necessarily have the time; they just have the heart.”  
-Elizabeth Andrew

**1. Underpinnings of Pro Bono Involvement**

- Why do attorneys and others volunteer?
- ABA Model Rule 6.1
- Identify the unique characteristics of and challenges for your program.
- LITC is the link between the attorney and the volunteer. This means providing ongoing support.

**2. The Basics- What systems need to be in place?**

- Attorney-related basics
  - Malpractice insurance for volunteers
  - Database to track information. Start with a simple database and add to it (or change it) as your pro bono panel grows and/or changes.
  - Case review. Consider who will review cases before they are referred to volunteers? What are the criteria that will be used for review?
  - Update system for case and volunteer follow-up.
  - Volunteer time tracking
  - Training opportunities
  - Mentors
  - Recognition system

- Client-related basics
  - Intake system. How will you obtain all the necessary case information? Who will complete the client intakes and prepare the case summaries? How will supporting tax documents be gathered and maintained?
  - Follow-up process. Who will contact clients to determine the status of ongoing cases? How often will clients be contacted?
  - Grievance policy

### 3. **Recruitment**

- Start by building relationships. Contact the state or local bar association tax law section and start attending meetings.
- Reach out to local accounting and enrolled agent societies.
- Identify key players, those respected in the tax law field, and ask them to conduct outreach for you.
- Promote, promote, promote! Volunteer to write bar association (written and electronic) publication articles. Take pictures at trainings to use with articles. (If necessary, ask permission to print the photos.)
- Target new tax attorneys and tax professionals. Highlight why LTC involvement can help them gain work experience and help others. It's a "win-win" opportunity!
- Create strategies tailored to the specific group you are targeting. (For example, small law firm or large law firm? Rural practitioners or urban practitioners?)
- Create opportunities for involvement (and remember to be flexible!) One kind of volunteer opportunity will not work for every volunteer. If a volunteer is unable to take a case, would they be willing to do outreach, write an article for an upcoming newsletter or teach at your next volunteer training?
- Volunteers keep volunteering when they feel part of something. Provide opportunities for volunteers to network with each other. Develop a volunteer newsletter and share volunteer success stories.

- Ask volunteers to contact peers to recruit new volunteers or to refer cases.
- Maintain a website with information about volunteer opportunities. (See [www.probono.net](http://www.probono.net))

#### 4. **Beyond the Basics**

- Advisory Board. Bring a group of key players together as often as necessary to provide feedback about the clinic. The board can also help plan volunteer trainings and provide ideas for new volunteer recruitment outreach.
- Library resources. Ask volunteers what books or other media resources might be helpful. Create a summary list of materials for quick reference. Contact local law librarians to learn about the newest publications addressing low-income taxpayer issues.
- Advanced recognition. Ideas include creating a unique lapel pin to give to volunteers, organizing an annual recognition luncheon or dinner, and asking a prominent member of the bench to send personal letters to each volunteer thanking them for their service.
- Volunteer surveys. Ask volunteers what they like and dislike about volunteering for the LITC. What other types of support would help them with their LITC cases? What topics would they like to see addressed at volunteer trainings?

#### 5. **Resources**

- “Effectively Representing Clients Before the New IRS”
  - This book, edited by Jerome Borison, includes a section about pro bono recruitment. A new edition is in the works.
- American Bar Association (ABA) Standing Committee on Pro Bono and Public Service and the Center for Pro Bono
  - Website- [www.abanet.org/legalservices/probono](http://www.abanet.org/legalservices/probono)
- See attached samples of forms and letters used by other clinics.